

Date \_\_\_\_\_

# Confidential Responsible Party Information

A B C

Name \_\_\_\_\_ Marital Status \_\_\_\_\_  
Last First Middle

Residence \_\_\_\_\_  Own  Rent  
Street City State Zip

Mailing Address \_\_\_\_\_ Email \_\_\_\_\_  
Street City State Zip

How long at this address \_\_\_\_\_ Previous Address \_\_\_\_\_  
(if less than 3 yrs) Street City State Zip

Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_

Social Security # \_\_\_\_\_ Birthdate \_\_\_\_\_ Relationship to Patient \_\_\_\_\_

Employer \_\_\_\_\_ Occupation \_\_\_\_\_ No. Years Employed \_\_\_\_\_

**Spouse's Name** \_\_\_\_\_ Relationship to Patient \_\_\_\_\_  
Last First Middle

Employer \_\_\_\_\_ Occupation \_\_\_\_\_ No. Years Employed \_\_\_\_\_

Social Security # \_\_\_\_\_ Birthdate \_\_\_\_\_ Work Phone \_\_\_\_\_

## Confidential Patient Information

Patient's Name \_\_\_\_\_  
Last First Middle

Address \_\_\_\_\_  
Street City State Zip

Home Phone \_\_\_\_\_ Birthdate \_\_\_\_\_ Social Security # \_\_\_\_\_

If patient is a minor, give parent's or guardian's name \_\_\_\_\_

Whom may we thank for referring you to our office? \_\_\_\_\_

## Insurance Information

Policy Holder's Name \_\_\_\_\_ and Soc. Sec. # \_\_\_\_\_

Insurance Company \_\_\_\_\_ Group No. \_\_\_\_\_ Union Local No. \_\_\_\_\_

Insurance Co. Address \_\_\_\_\_ Insurance Co. Phone \_\_\_\_\_

Policy Holder's Employer \_\_\_\_\_

Do you have dual coverage? No  Yes  If yes:

Policy Holder's Name \_\_\_\_\_ and Soc. Sec. # \_\_\_\_\_

Insurance Company \_\_\_\_\_ Group No. \_\_\_\_\_ Union Local No. \_\_\_\_\_

Insurance Co. Address \_\_\_\_\_ Insurance Co. Phone \_\_\_\_\_

Policy Holder's Employer \_\_\_\_\_

## Emergency Information

Name of nearest relative not living with you \_\_\_\_\_

Complete Address \_\_\_\_\_

Phone \_\_\_\_\_ Relationship: \_\_\_\_\_

I understand that where appropriate, credit bureau reports will be obtained.

Signature (Parent's signature if minor) \_\_\_\_\_

Updates (date & initial) \_\_\_\_\_

**MEDICAL HISTORY**

Physician \_\_\_\_\_ Date of Last Visit \_\_\_\_\_  
Address \_\_\_\_\_ Phone \_\_\_\_\_

Please circle Yes or No (If Yes, please fill in details)

- Yes No Is the patient taking any medication? \_\_\_\_\_
- Yes No Is the patient allergic to any medication? \_\_\_\_\_
- Yes No History of a major illness? \_\_\_\_\_
- Yes No Has the patient had any operations? \_\_\_\_\_
- Yes No Ever been involved in a serious accident? \_\_\_\_\_
- Yes No Have seen a physician in the last 12 months? Why? \_\_\_\_\_
- Female Patients only:
- Yes No Has menstruation started? \_\_\_\_\_
- Yes No Is the patient pregnant? \_\_\_\_\_

Circle any of the medical conditions below that the patient has had or currently has.

- |                              |                            |                          |                        |
|------------------------------|----------------------------|--------------------------|------------------------|
| Abnormal bleeding/Hemophilia | Diabetes                   | Hepatitis/Liver problems | Pneumonia              |
| Anemia                       | Dizziness                  | Herpes                   | Prolonged Bleeding     |
| Arthritis                    | Epilepsy                   | High Blood Pressure      | Radiation/Chemotherapy |
| Asthma or Hayfever           | Gastrointestinal Disorders | HIV / Aids               | Rheumatic Fever        |
| Bone Disorders               | Heart Problems             | Kidney problems          | Tuberculosis           |
| Congenital Heart Defect      | Heart Murmur               | Nervous Disorders        | Tumor or Cancer        |

Are there any medical conditions we have not discussed that you feel we should be aware of? \_\_\_\_\_

**DENTAL HISTORY**

General Dentist \_\_\_\_\_ Date of last visit \_\_\_\_\_

What concerns you most about your teeth? \_\_\_\_\_

- Yes No Is the patient presently in any dental pain? \_\_\_\_\_
- Yes No Ever experienced any unfavorable reaction to dentistry? \_\_\_\_\_
- Yes No Has the patient ever lost or chipped any teeth? \_\_\_\_\_
- Yes No Have there been any injuries to face, mouth, or teeth? \_\_\_\_\_
- Yes No Is any part of your mouth sensitive to temperature? Where? \_\_\_\_\_
- Yes No Is any part of your mouth sensitive to pressure? Where? \_\_\_\_\_
- Yes No Do gums bleed when brushing? \_\_\_\_\_
- Yes No Any type of thumb or tongue habit? \_\_\_\_\_
- Yes No Is the patient a mouth breather? \_\_\_\_\_
- Yes No Has the patient ever seen an orthodontist? If yes, who and when? \_\_\_\_\_
- Yes No What is the patient's attitude toward receiving orthodontic treatment? \_\_\_\_\_
- Yes No Has anyone in the family received orthodontic treatment? \_\_\_\_\_
- How did they feel about the result? \_\_\_\_\_
- Yes No Do teeth or jaws ever feel uncomfortable first thing in the morning? \_\_\_\_\_
- Yes No Experience jaw clicking or popping? \_\_\_\_\_
- Yes No Aware of clenching or grinding teeth during the day? \_\_\_\_\_
- Yes No Experience "tension" headaches? \_\_\_\_\_
- Yes No Has the patient ever experienced chronic ringing in the ears? \_\_\_\_\_
- Yes No Does the patient need extra help with instructions? \_\_\_\_\_
- Yes No Is the patient sensitive or self-conscious about his/her teeth? \_\_\_\_\_
- Yes No Height of parents? Mom \_\_\_\_\_ Dad \_\_\_\_\_
- Yes No Are you aware that some appointments will be during school hours? \_\_\_\_\_

**BENEFITS**

Benefits of Orthodontics: Aesthetics, Health, and Function. Orthodontics is a service that provides an improvement in the appearance of the teeth, in the general function of the teeth, and in general dental health. Teeth, gums, and jaws are an intricate body part and can fail to respond to treatment. If good oral hygiene is not practiced, tooth decay and enlarged gums can result. Joint discomfort and root shortening are observed in a small percentage of cases. Teeth change throughout our lifetime and there can be some movement of teeth and some change after treatment. I have read and understand this paragraph. I also understand that my diagnostic records and my name may be used for educational and promotional purposes. I have truthfully answered all the above questions and agree to inform this office of any changes in my medical or dental history. In addition, I authorize Dr. \_\_\_\_\_ to perform a complete orthodontic evaluation.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_